

APPENDIX 9-2

Level I Help Desk Recommendations

Level I Help Desk Recommendations

The following information is provided for counties who are interested in establishing a formal Level I Help Desk. The WDTIP Implementation Team will provide further support to any county who requests assistance in the development of a Help Desk. Information provided in this appendix includes suggestions on staffing recommendations, hardware and software requirements, equipment needs and reference material recommendations.

Staffing Recommendations

For those counties who have dedicated resources to a county Help Desk function, it is not anticipated that additional resources will be required. It is recommended that the remaining 23 counties designate one or more resources to adequately provide the support needed. The number of resources that may be required varies considerably, based upon: size of the county, volume of county work, county data conversion schedules and system user understanding of the WDTIP system. It is also recommended that the staff designated by the county to provide WDTIP user support have the following qualifications:

- o Knowledge of TANF, CalWORKs and ~~Welfare-to-Work~~ WTW program policies, regulations and procedures.
- o CalWORKs eligibility background
- o Functional knowledge of the WDTIP system including navigation, screens, system processing for time clock calculations, file transfer protocol and exception and report file processes.
- o Knowledge of MEDS functionality
- o Ability to analyze data
- o Strong communication skills
- o Ability to use other available software/tools to manage Help Desk functions.

During ongoing use of the WDTIP system, most counties will be able to handle all WDTIP end user issues and questions, perform the necessary research and analysis, and resolve questions or problems in a timely manner. However, demand for assistance may be greater during the first few months of system rollout and during conversion of the county's data into the WDTIP system. Following WDTIP system rollout and data conversion, the volume of Help Desk referrals is expected to decrease. It is important that the county continue to provide Help Desk support after the WDTIP system implementation and conversion phases are completed. New requirements may be introduced resulting in changes to the WDTIP system after implementation. When and if these changes occur, the system users will rely on their County Help Desk for support.

Hardware/Software Requirements

For those counties who have chosen to dedicate resources to the Help Desk function it is recommended that they have MEDS access (either a PC with 3270 MEDS terminal

emulation or a MEDS terminal). Acting as the first level of support, they will be attempting to resolve any WDTIP system problems prior to forwarding it to the WDTIP Help Desk. Counties may also elect to develop their own help desk contact tracking tool.

Equipment Needs

There may be occasions when all designated county Help Desk phones are busy and additional calls will need to be received. It may be necessary, especially in larger counties, to have a mechanism for handling these overflow telephone calls. Possible solutions include voicemail (for the designated County Help Desk resource(s)) or having the call forward to support staff who could take a message for the county Help Desk resource for a return call. The option chosen will depend upon the needs and budget of the county.

Reference Material Recommendations

The table below provides a list of reference materials that are recommended for County Help Desks.

Table 9-1: Reference Material Recommendations

<i>Item</i>	<i>Description</i>
CDSS Program Policy Manual	Eligibility and Assistance Standards Manual
County Help Desk Contacts	A list of county designated help desk staff. List will include name, county, phone number and e-mail address (if available)
County Help Desk Forms	County specific help desk contact forms (if the county chooses to use forms other than the WDTIP Help Desk Ticket)
County Help Desk Operations and Procedures	County specific contact procedures that detail how a county user will contact the county help desk.
County WDTIP Reports	Copies of the county specific reports that will be derived from the report data files that will be sent from the WDTIP system to county/consortia systems on a monthly basis.
County WDTIP System User List	A list of county authorized WDTIP system users.- Listed by user name or user number.
WDTIP Business Data Dictionary	Field level descriptions of WDTIP system codes and screen standards.

<i>Item</i>	<i>Description</i>
WDTIP External Developer's Guide	The technical document provided as reference materials for creating the programs that generate the county/consortia batch extraction files. -This document also includes the TRAC Reference Codes which provides all of the reference codes that are accepted and/or displayed by the WDTIP system.
WDTIP Help Desk Phone Directory	A directory of the WDTIP help desk staff including names, phone numbers, e-mail addresses and fax numbers.
WDTIP Help Desk Ticket Form	The form that will be used by county help desk will use to report an incident to the WDTIP Help Desk.
WDTIP Monthly Bulletins	Monthly bulletin published by the WDTIP Help Desk that provides users with system functionality information and details system changes.
WDTIP Operations and Procedures	WDTIP Help Desk operational procedures for level 2 and level 3 help desks.
<i>WDTIP Training Curriculum</i>	The system training curriculum that will be provided during the WDTIP system rollout. This curriculum provides step-by-step instructions for completing basic tasks in the WDTIP system, including the WDTIP User Manual and the Change Leadership Guide.
<i>WDTIP User Manual</i>	The "how-to" manual provided during the WDTIP system functionality training. -Will include sections that will detail System Administrator procedures, Help Desk contact procedures and Screen/Field/Error Help Information.